

Application Number : 10/617,349
Applicant : Isaac J. William
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Examiner : Frenel, Vanel
Docket Number : OR01-17401
Customer No. : 51067

Confirmation Number: 2738

Proposed Amendment and Interview Summary
Via Fax (571) 273-6769 and Electronic Filing

PROPOSED AMENDMENT AND INTERVIEW SUMMARY

Dear Examiner Shin:

In light of the interview on **16 December 2008**, please find the proposed amendment and an interview summary below.

Identification of Claims and Reference Discussed

Claim(s) for discussion: Claim 1

Reference(s) for discussion: LaMotta et al. (U.S. Pub. No. 2003/0126018, hereinafter “LaMotta”), in view of Sullivan (U.S. Pub. No. 2003/0055754, hereinafter “Sullivan”).

Applicant’s Arguments

Neither LaMotta nor Sullivan discloses a tax service that is configured to receive tax rules and data in an XML (Extensible Markup Language) format or an EDI (Electronic Data Interchange) format, thus enabling a third party provider, a tax professional, or an end user to enter the tax rules and data in a machine readable format without requiring programming.

In contrast, embodiments of the present invention include a tax service that is configured to receive tax rules and data in an XML format or an EDI format, thus enabling a third party provider, a tax professional, or an end user to enter the tax rules and data in a machine readable format, without requiring

programming (instant application, pars. [0038], [0055], and [0058]). The XML or EDI formats allows new jurisdictional rules to be implemented by merely loading additional data and rules in these formats (instant application, par. [0076]).

Proposed Amendment:

(Currently amended) An apparatus for determining taxes that is configurable for local jurisdictions, comprising:

a tax knowledge base, embodied in a computer system, wherein the tax knowledge base includes tax rate data pertaining to taxes in local jurisdictions;

an external tax service interface, embodied in a computer system, configured to interface to a third party tax service provider to perform tax computations for another local jurisdiction which is simultaneously applicable;

a tax rule base, embodied in a computer system, wherein the tax rule base includes one or more rules for applying taxes in local jurisdictions and wherein the tax rule base is configured to receive tax rules and data in an XML (Extensible Markup Language) format or an EDI (Electronic Data Interchange) format, thus enabling a third party provider, a tax professional, or an end user to enter the tax rules and data in a machine readable format without requiring programming; and

a tax determination manager, embodied in a computer system, that is configured to determine a tax for a transaction using the tax knowledge base and the tax rule base.

Outcome of Interview

Examiner will consider the amendments.

Respectfully submitted,

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